User Manual

Materials Control

Production Tool

Copyright by:
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Date: March 2012

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Description:

This module was created to handle multiple issues for a pre-production kitchen. The Production Tool enables you to place order requests or issue requests based on requirements. It also allows you to produce internal products (e.g. a Sauce Bolognese) in the production kitchen.

Those products, converted to stock articles can be transferred later in the usual transfer module.

Preparation:

COST CENTERS/STORES:

In order to use this function no specific parameter must be set in the cost center / store configuration.

If you want to use the “Production on Transfer” function, you have to activate the parameter “Enable Production on Transfer” in the setup. This will then allow the production while doing a transfer of the stock article attached to a recipe.

RECIPES:

The recipes used for the production tool must be linked to production articles.

During the production process the application will reduce the ingredients in the production store based on the recipes and it will create stock items which can be used for further transactions.

This can be done in two ways.

- Manual created Production Article (PA)
- System created Production Article (PA)

For both cases a proper group structure must be created for these articles first.

Create, if required, separate over group and major group for the PA’s.
At least a separate item group for the PA’s should be created.

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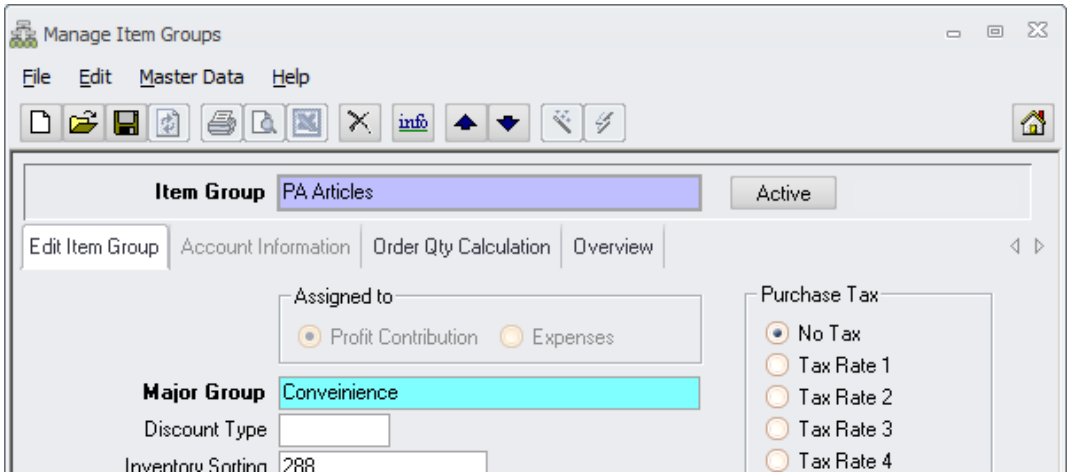
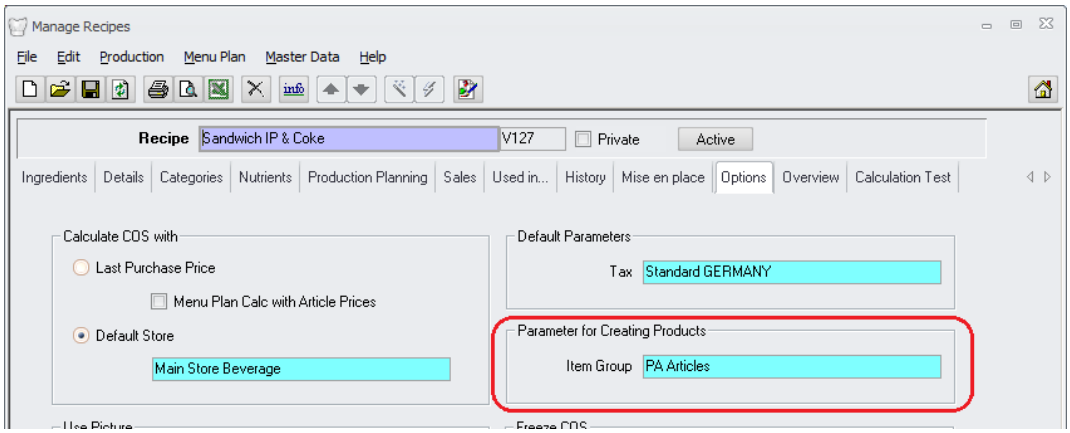


Go to Production > Recipe > Options:



Go to the section “Parameter for Creating Products” and select the defined item group for PA’s.

Click on the button

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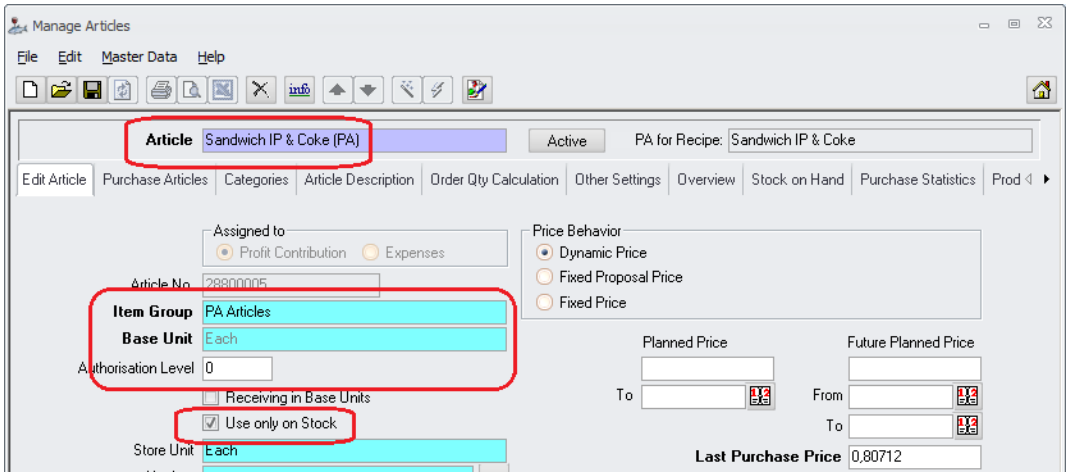
MANUALLY CREATED PRODUCTION ARTICLE:

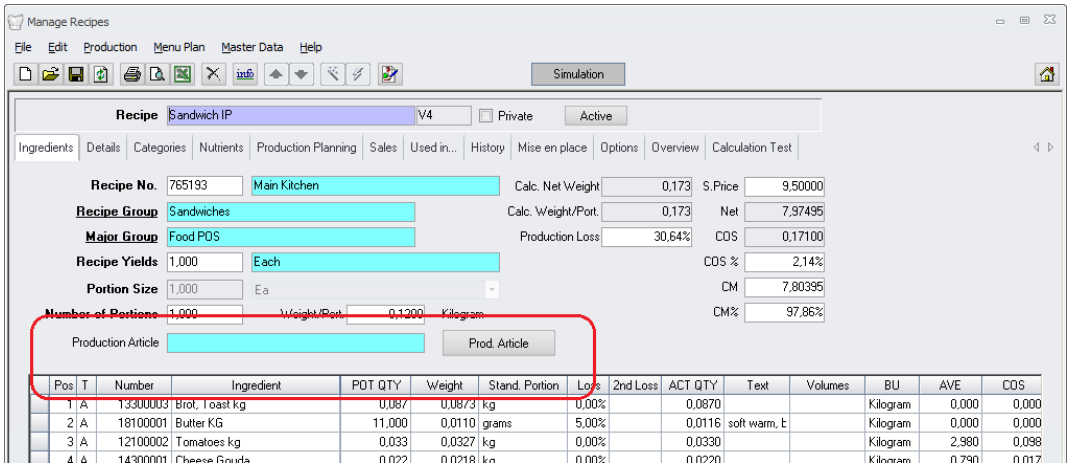
Go to Master Data > Articles:

Create a new stock article with the name prefix / suffix “(PA)”. Assign the item group created before and the base unit “Each” to this article.



Mark this article as “Use only on Stock”

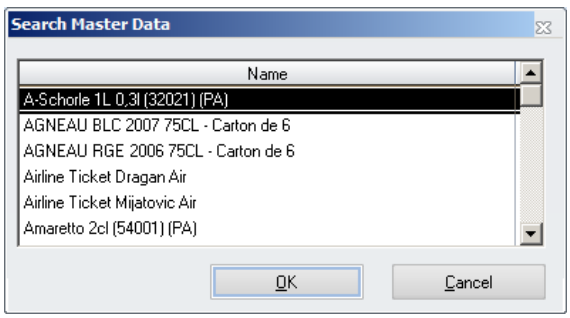
Go to Production > Recipe > select your production recipe:



In the middle of the screen the Production Article Assignment is shown.

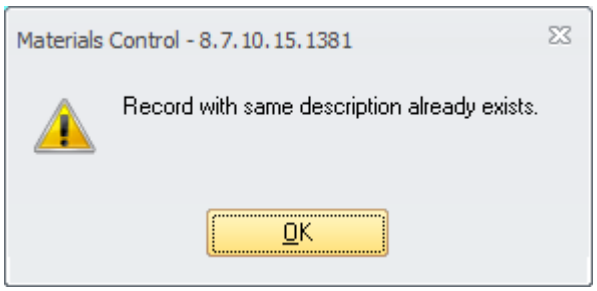
There are two options to link a recipe to an existing PA:

a) Place the cursor in the selection field “Production Article” and click OK:



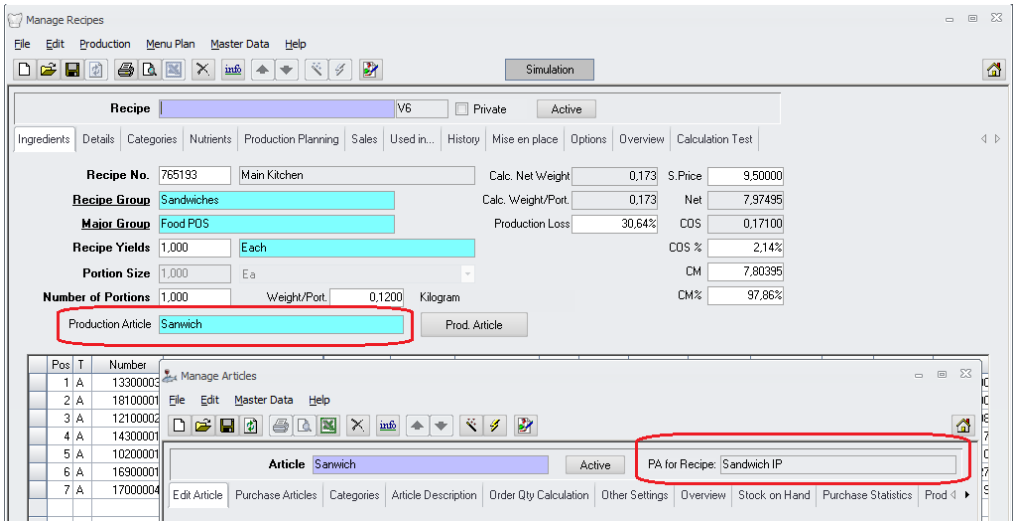
The application calls the usual article selection screen. Select your PA from the list and click OK.

One PA can be linked with one recipe only. If the user tries to link a recipe against a stock item which is already linked the following message is shown:

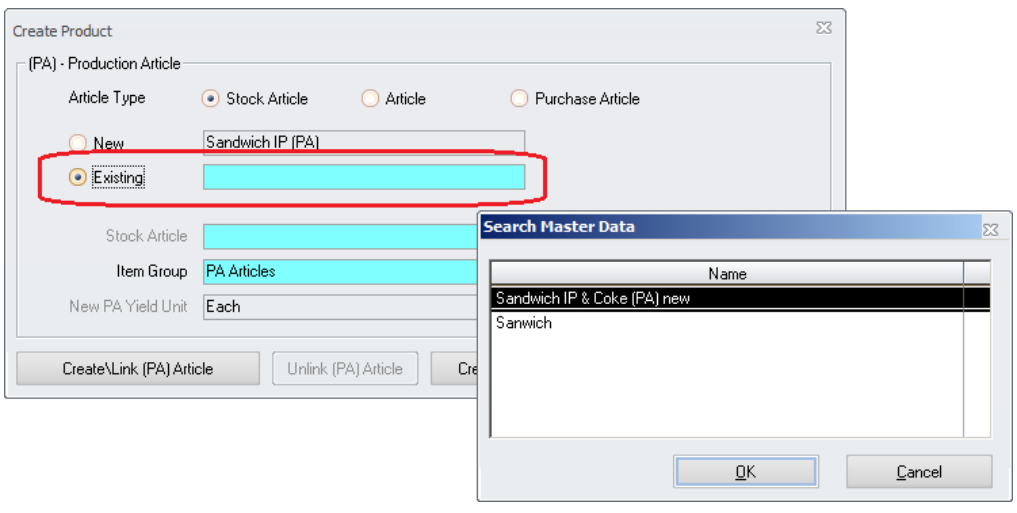


Once linked successfully just save the recipe as usual.

The link is now visible in the recipe as well as in the stock article:

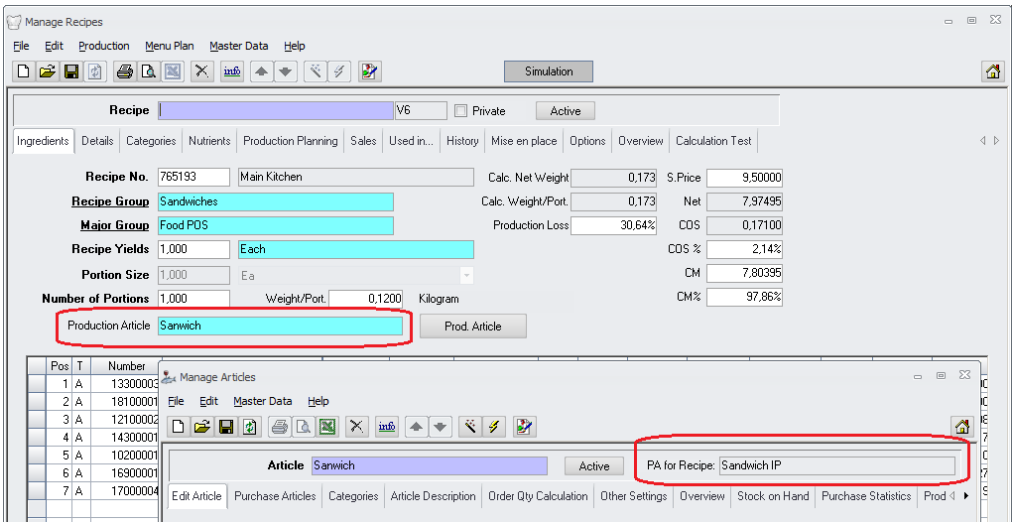


b) Click on the button “Prod. Article” to link the recipe with the PA:



This dialog offers several options. Select the options “Stock Article” at the top and then select the radio button “Existing”. Here the user can select from all stock articles assigned to the define PA Item Group. Once linked successfully just save the recipe as usual.

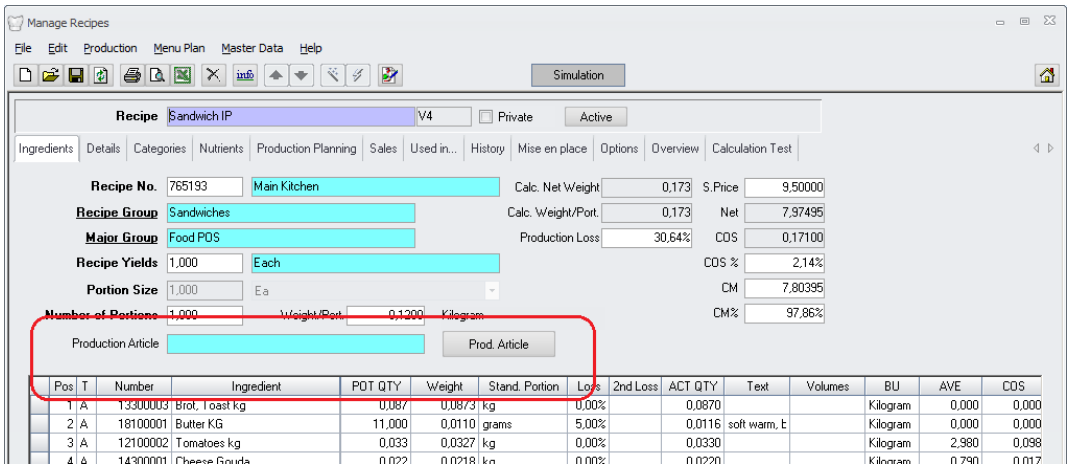
The link is now visible in the recipe as well as in the stock article:



SYSTEM CREATED PRODUCTION ARTICLE:

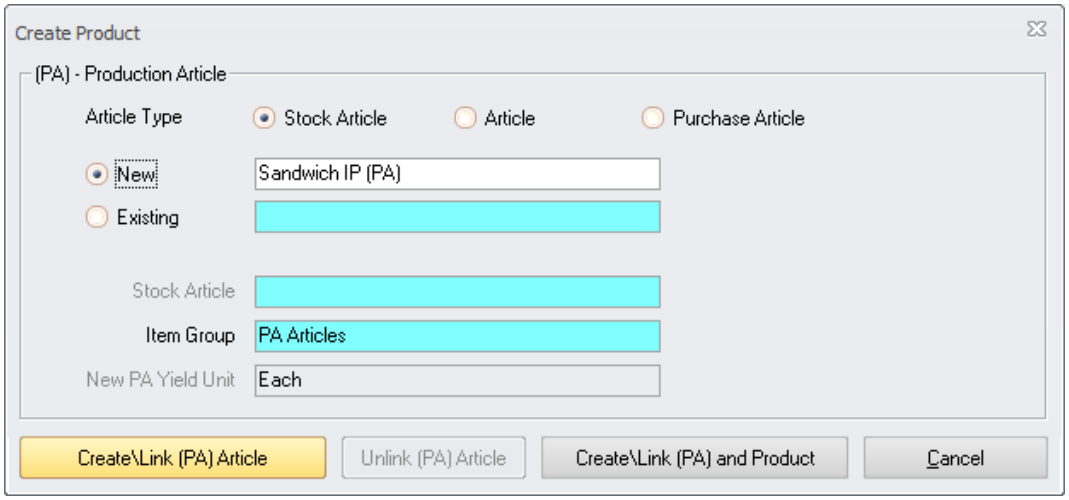
There is also the option to start with the recipe creation and there, from this module, create new Production Articles directly.

Go to Production > Recipe > select your production recipe:



In the middle of the screen the Production Article Assignment is shown.

Click on the button “Prod. Article”



- At the top of the screen select the article type “Stock Article”.
- Select the radio button “New”. The system offers a recommended name “{Recipe Name} || (PA)”. This can be accepted or adjusted as required.
- The system already suggests the previously defined Item Group
- Click on the button “Create\Link (PA) Article”

Once linked successfully just save the recipe as usual.

The link is now visible in the recipe as well as in the stock article:

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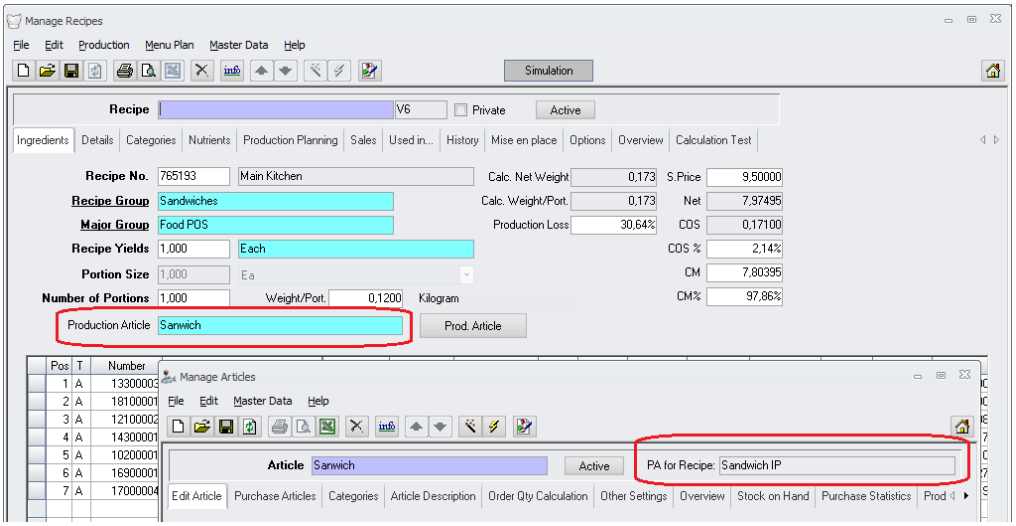
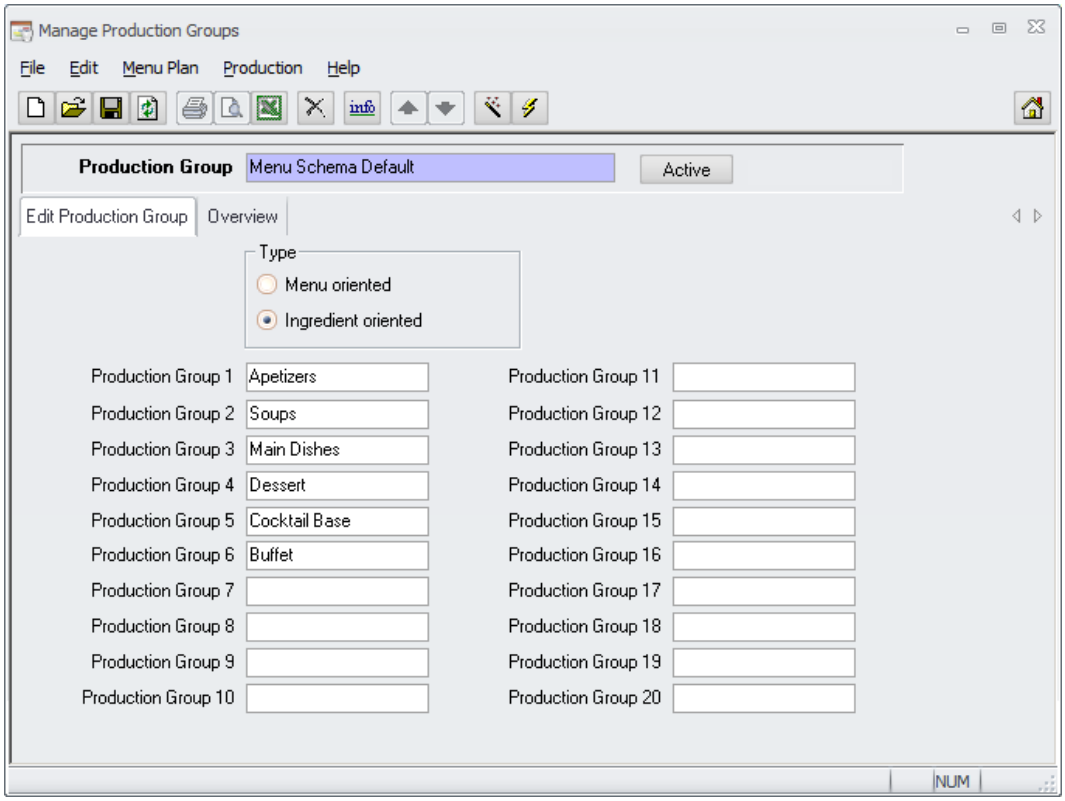

Manage Recipes
File Edit Production Menu Plan Master Data Help
Simulation
Recipe
V6
Private
Active
Ingredients Details Categories Nutrients Production Planning Sales Used in... History Mise en place Options Overview Calculation Test
Recipe No. 765193 Main Kitchen
Recipe Group Sandwiches
Major Group Food POS
Recipe Yields 1,000 Each
Portion Size 1,000 Ea
Number of Portions 1,000 Weight/Port. 0,1200 Kilogram
Production Article Sanwich
Prod. Article
Calc. Net Weight 0,173
Calc. Weight/Port. 0,173
Production Loss 30,64%
S.Price 9,50000
Net 7,97495
COS 0,17100
COS % 2,14%
CM 7,80395
CM% 97,86%
Pos T Number
1 A 13300003
2 A 18100001
3 A 12100002
4 A 14300001
5 A 10200001
6 A 16900001
7 A 17000004
Manage Articles
File Edit Master Data Help
Article Sanwich
Active
PA for Recipe: Sandwich IP
Edit Article Purchase Articles Categories Article Description Order Qty Calculation Other Settings Overview Stock on Hand Purchase Statistics Prod

PRODUCTION SCHEMA:

To use the production Tool the production groups must be edited first.

Go to Production > Production Groups:

Here we have to define the Production Group Schema. For evaluation purposes you can define various schemas. At least one is required for the usual functionality.



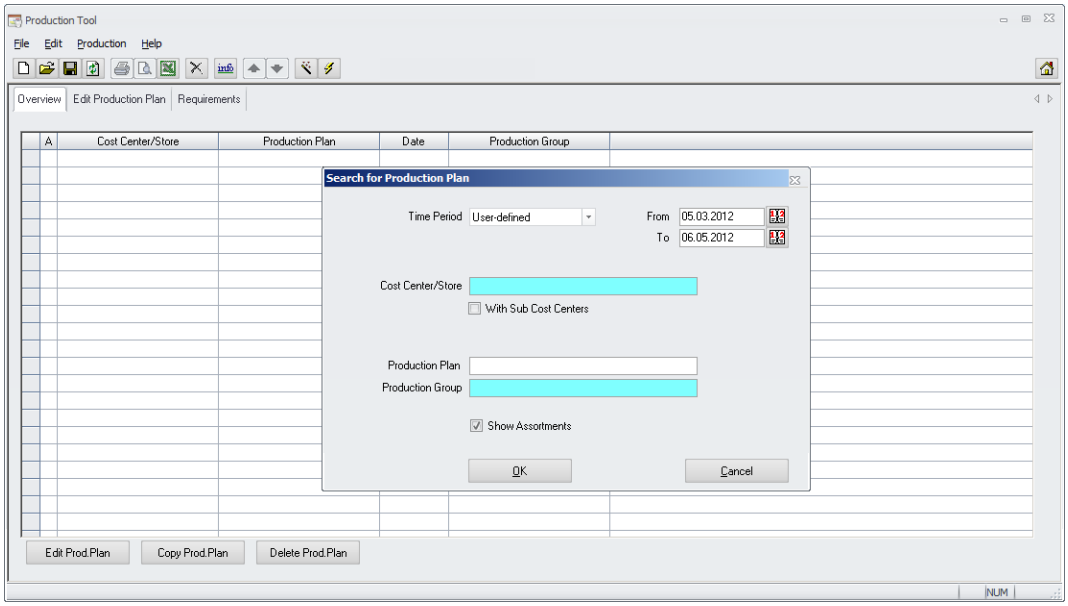
- Define a default schema named e.g. “Menu Schema Default” appears.
- Select the type “Ingredient oriented”.
- Now you can define up to twenty groups for this schema.

Click on “Save” to save the entered information.
(Other options for future use)

PRODUCTION TOOL:

This is the main application to “convert” single stock articles into pre-produced items, usable for further transactions.

Go to Production > Production Tool:

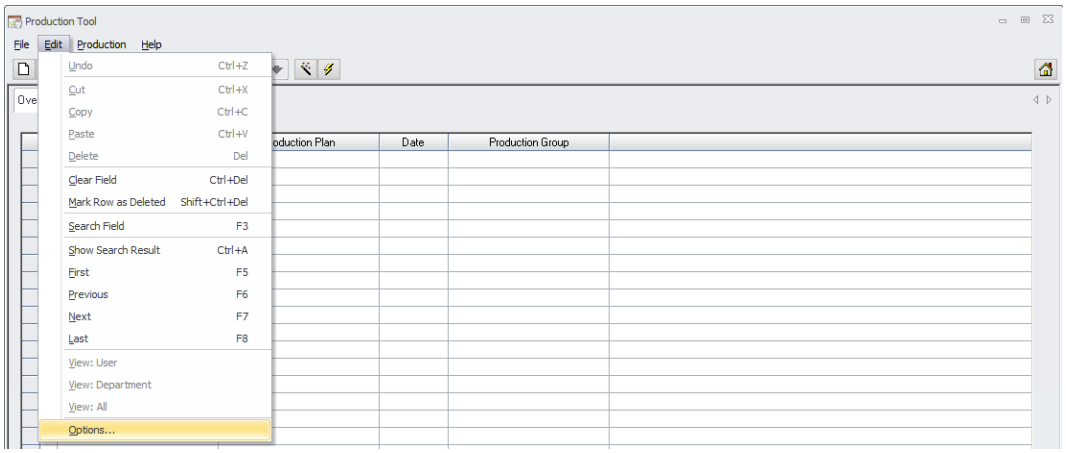


When opening the module a search filter is offered. In case of already existing production plans this can be used to limit/filter the displayed plans
Click “OK” or “Cancel” to close the dialog window.

OPTIONS:

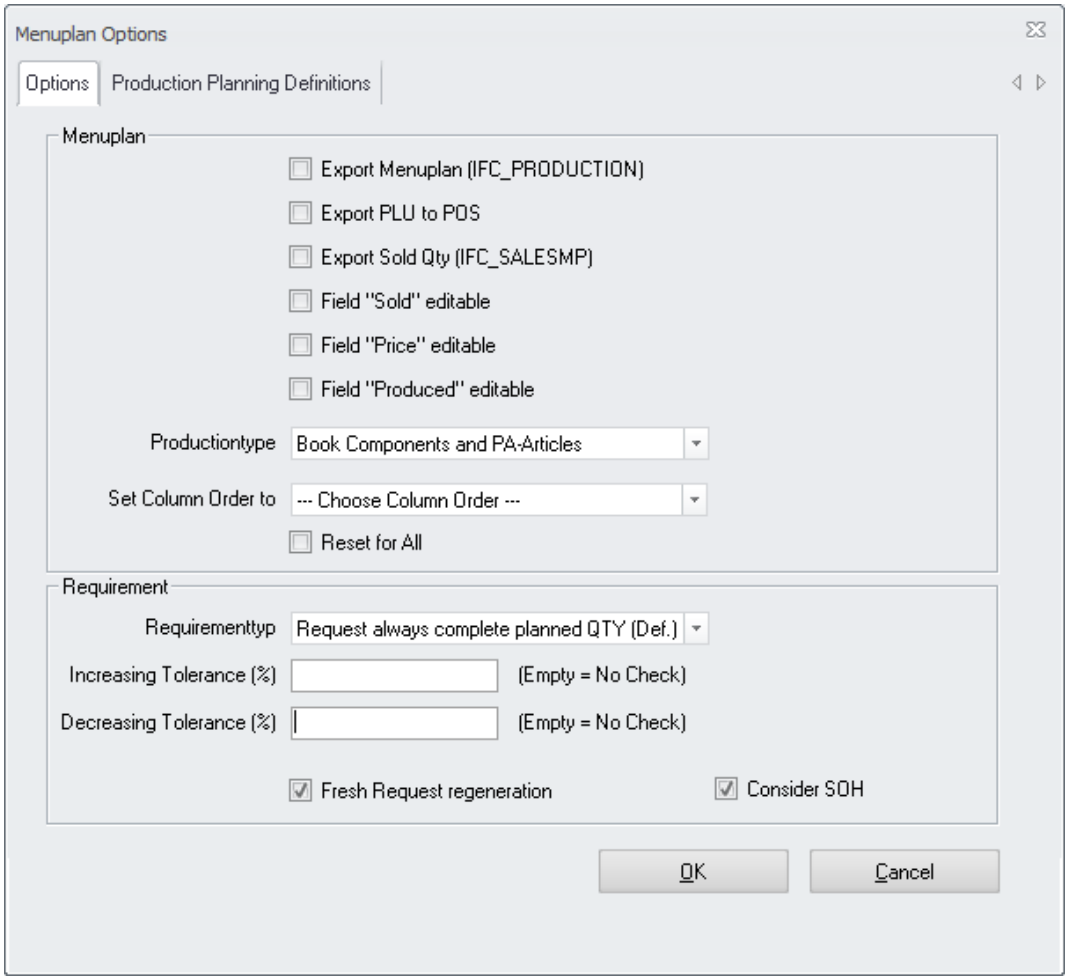
First some calculation parameters must be defined.

Go to Edit > Options:



The application will now open a new screen labelled as “Menuplan Options”:

Here you can find several parameters:



- Export Menuplan: Customized solution
- Export PLU to POS: Customized solution
- Export Sold Qty (IFC_SALESMP): Customized solution
- Field “Sold” editable: Customized solution
- Field “Price” editable: Customized solution

- Production Type
  - Book Recipes on booking Sold-QTY
    > Customized solution
  - Book only Components from Store
    > only the recipe ingredients will be reduced from store and calculated in the consumption
  - Book Components and PA Articles
    > Ingredients will be reduced from store and PA-Article will be created on store. **Select this option!**

Section Requirement:
Here you can find the following parameters:

- Requirement Type

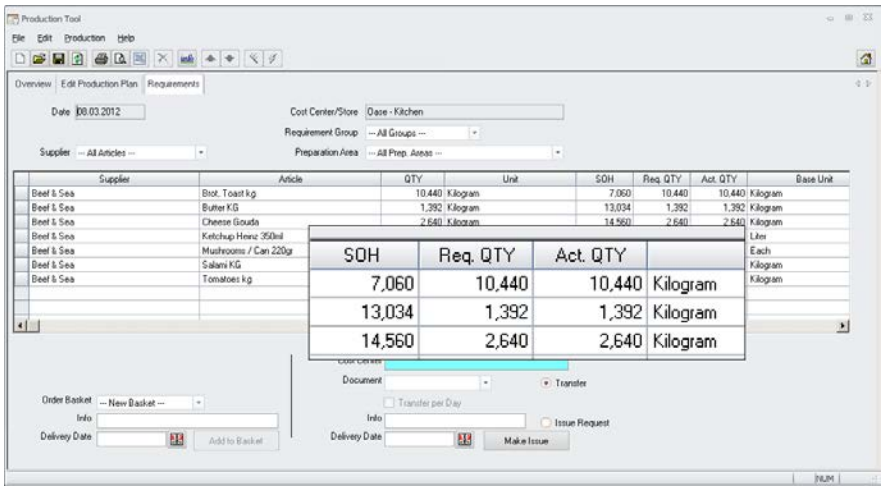
- Request always complete planned QTY (Def.)
  - QTY defined in “Planned” rules the requirement
- Request only Difference of planned QTY
  - Difference between planned and produced will be requested
- Request Nothing
  - No request will be generated

- Increasing Tolerance %
  - Percentage value to adjust QTYs
- Decreasing Tolerance %
  - Percentage value to adjust QTYs

- Fresh Request Generation:
  - QTYs will be refreshed & recalculated always when generating the requirements

- Consider SOH
  - This option allows to use the current SOH for the requirement calculation as well.

    If the option is **not** selected, the system shows the SOH and the requested quantity (based on the production plan), but the SOH is not considered when generating the final Act. QTY:



➔ Req. QTY =Act. QTY

If the option is selected, the system shows the SOH and the requested quantity (based on the production plan), and the current SOH is considered when generating the final Act. QTY:

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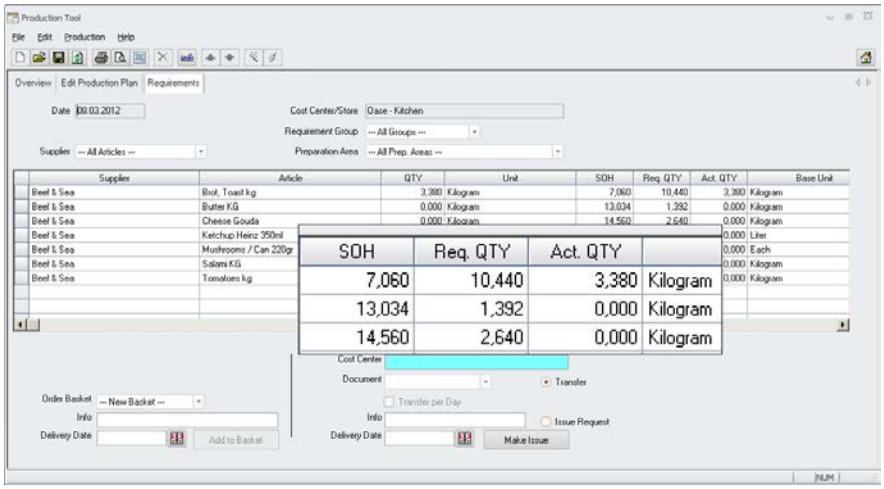


➔ Req. QTY – SOH =Act. QTY

Tab “Production Planning Definitions”:
This is a customized solution.

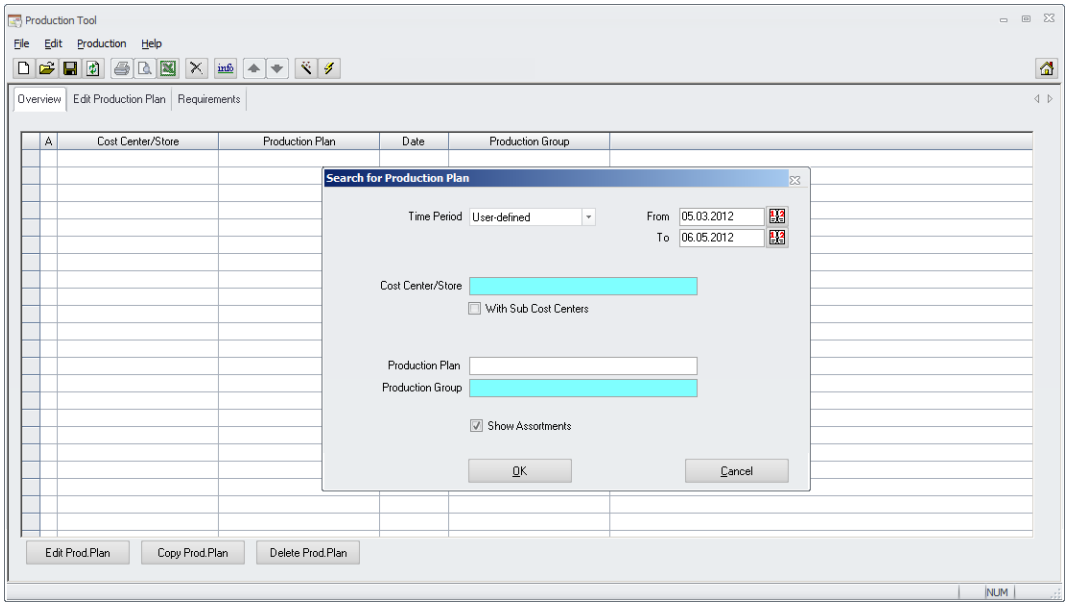
Functionality:

PRODUCTION PLAN:

The following will describe the use & workflows.

Go to Production > Production Tool

This module was created to handle multiple issues for a pre-production kitchen. The Production Tool enables the user to place Order/Issue Requests based on recipes.



- Edit Production Plan:
  This option allows to edit an existing production plan. If the plan was already booked it is not possible to change the quantity anymore.

- Copy Production Plan:
  This option allows to copy an existing plan and save it with a new name.

- Delete Production Plan:
  This option allows to delete an existing plan. If this plan was booked already the transaction will not be rolled back.

Click on the icon to create a new plan.

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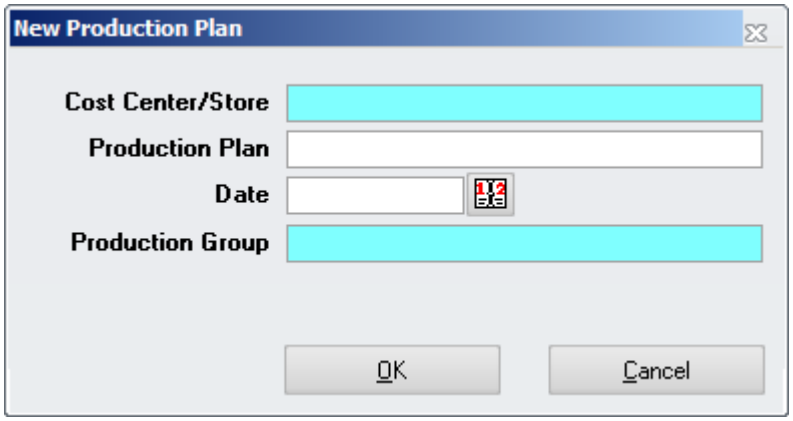
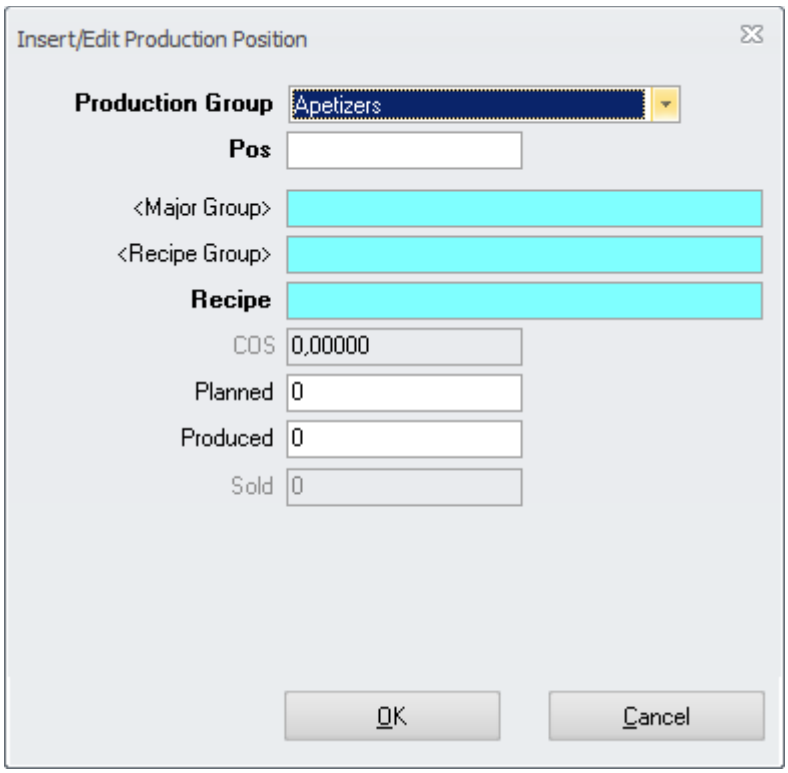


- Select the Cost Center / Store where this production plan is related to.
- Enter a name to identify the plan.
- Select the date for this production plan.
- Select the Production Schema from the selection box.
- Click on OK.

Now the Plan header is created. A new dialog comes up to select the recipes.



- Select the Production Group from your schema.
- Enter a position number.
- If needed you can filter by major group or recipe group.
- Select recipe from list.

- Enter the quantity into the fields “Planned” and/or “Produced”.

- Click on “OK”.

When clicking “Cancel” the dialog is closed and you can see the table view of the plan.

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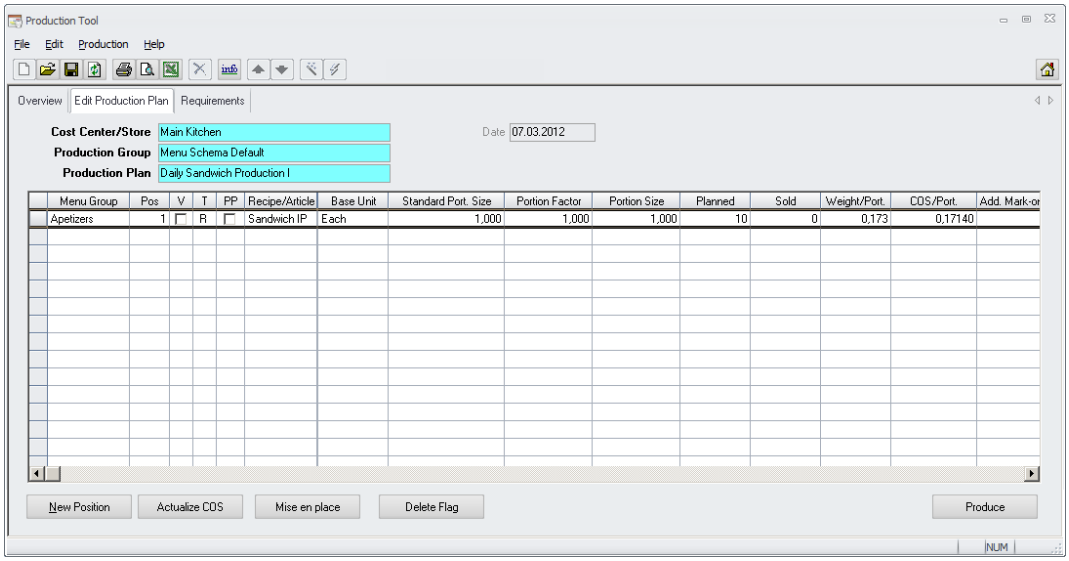
Click on “Save”.



The following buttons are available:

New Position

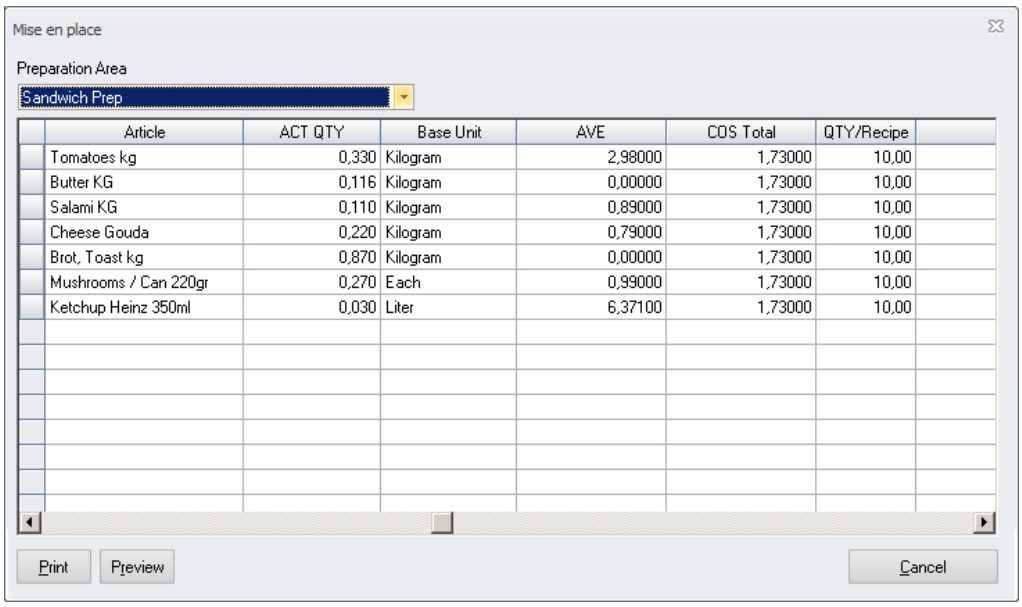
- To add a new position to the plan. After opening an existing plan from the overview the user will have to save the plan first.

Actualize COS

- To re-fresh the COS for the used recipes from the selected store.

Mise en place

- To show all needed ingredients, also for subrecipes. This information can be pre-viewed and / or printed here:



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- Usual function to mark selected records for deletion at next save.

- Click this button to book this transaction as defined in the parameters (Book Components and PA Articles).

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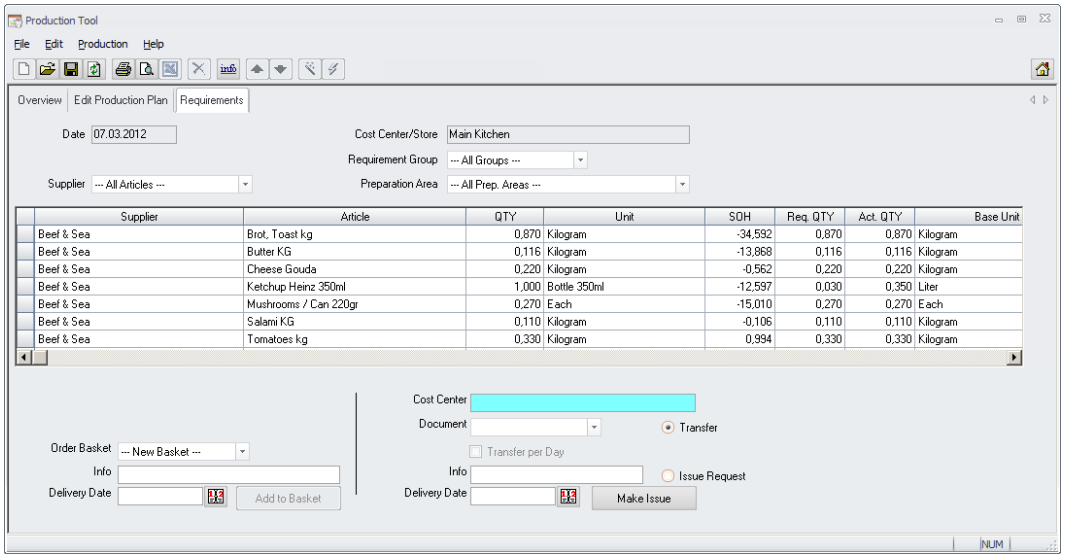
REQUIREMENTS:

The tab “Requirements” allows, based on assigned user rights, to generate Issue Requests or Order Baskets for the needed ingredients.

Click on the TAB “Requirements”



The tab header shows the date and the related cost center.
In addition three drop-down selectors can be used to sort and/or filter the details in the grid:

- Supplier
  - This selector must be used if an order basket should be created.
    The default setting is “All Articles”. This allows to create an issue request only. The user must selected either “All Suppliers” or any specific supplier from the drop down to activate the button “Add to Basket”.
    NOTE: When having “All Suppliers” selected, the application will show values in the column “QTY” for all records. The system will generate the requirements for articles having DPQs only! For positions not having DPQs the system will not generate the order basket records.

- Requirement Group
  - Here the user can filter for specific Requirement Groups (> see: Master Data > Item Groups!)

- Preparation Area
  - Here the user can filter for specific Preparation Areas.

The application displays all articles and the corresponding Default Price Quotes (DPQ). (A default price quote MUST be defined for the articles.)

Grid Description:

- Supplier
  - This is the Supplier defined in the DPQ

- Article
  - Name of the stock article

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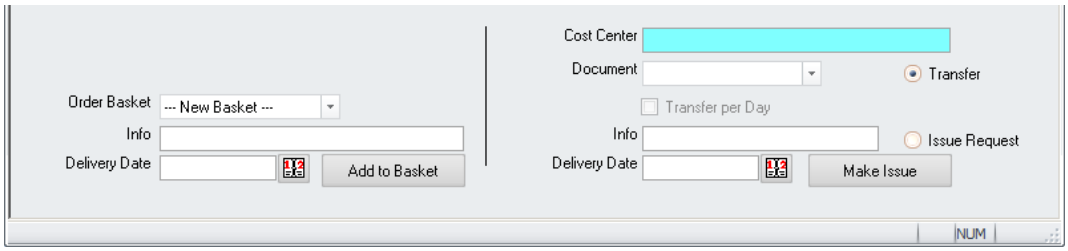
- QTY
  - QTY to be ordered/requested
- Unit
  - Unit to be ordered/requested
- SOH
  - Current Stock on Hand for this article in preferred stock unit/DPQ Unit
- Req. QTY
  - Required quantity in Base Unit
- Act.QTY
  - Final QTY to be ordered/requested in BU based on “Consider SOH” definition
- Base Unit
  - Base Unit assigned to the article

Document Creation Options:

Based on the rights the user can create an Order Basket, an Issue Request or a saved Transfer directly out of the requirements:



NOTE: All articles required are shown in the grid, but the application will consider articles having DPQs only at creation of documents!

The left section contains the fields to generate an Order Basket:

- Order Basket
  Selection box, shows all existing baskets. Select one to add these articles to an existing basket, select “---New Basket---“ to generate a new one.
- Info
  Here additional information can be entered.
- Delivery Date
  Select the delivery date for the basket.

  Add to Basket

  Click on this button to create the order basket and to transfer the document to the Purchase Order module. From here it can be edited and processed as a normal order basket.

The right section contains the fields to generate an Issue Request:

- Cost Center
  Select the cost center where the goods should be requested from.

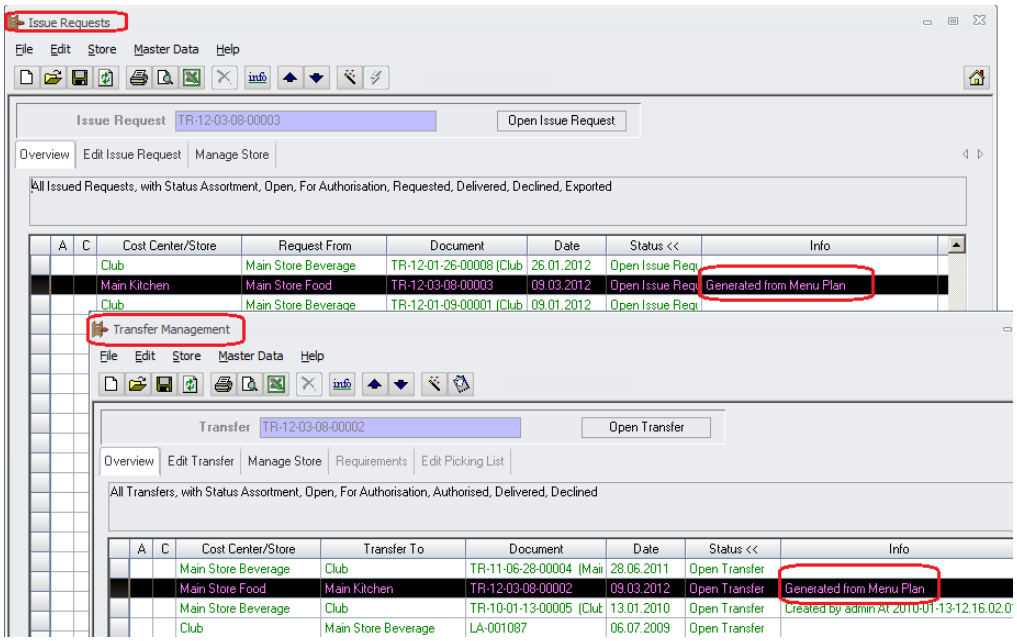
- Document
  Select an existing document or create a new one

- Delivery Date
  Select the delivery date for the request.

- Info
  Here you can type in some additional information

- Transfer / Issue Request
  These radio buttons allow to control which type of document will be created.

Click on this button to create the document. It will now be visible as Open Issue Request / Open Transfer in the corresponding module. From here it can be edited and processed as usual.



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